



Phoenix Software Ltd

MICROSOFT VIVA INSIGHTS FOR CHARITIES AND HOUSING POWERED BY PHOENIX

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LET'S TALK

We'd love to hear from you – so please don't hesitate to contact us if you require any details or information.

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INTRODUCTION

In today's world, employees want **more flexible remote working options**, and **meaningful in-person collaboration**. Empowering people to thrive in a more flexible work-world requires rethinking everything—from how you empower managers, to how you create culture, to how you reimagine the employee experience. And that's where **Microsoft Viva Insights** and **Phoenix Software** comes in.

The Microsoft Viva suite is an **employee experience platform (EXP)** that brings together communications, knowledge, learning, resources, and insights in the flow of work. The 4 pillars of Microsoft Viva are:

- Viva Learning
- Viva Insights
- Viva Topics
- Viva Connections

Viva not only fosters a culture that empowers people and teams to be their best, wherever they work, it creates a culture where people thrive. As your employees are challenged with a growing imbalance between work and life, increased burnout, and decreased wellbeing, and your teams and organisation face diminishing social interaction, there is an urgent need to **digitally reimagine the employee experience**.

At Phoenix, we know that Charity and Housing organisations are often large and complex, with a wide range of services and users with differing needs and requirements, making managing wellbeing and organisational culture a challenge. With our support, you can discover how Microsoft Viva Insights, an integrated platform built on top of Microsoft Teams and integrating with M365 including Outlook, can help you and your people to be their best, to **thrive in the new reality**.

Balance productivity and wellbeing - Viva Insights **helps people and the Charities and Housing sector thrive** with recommendations to improve productivity and wellbeing. Providing data and insights for managers and leaders to help truly understand the ways of working within the organisation, identifying opportunities to improve wellbeing and engagement.

Empower users with a healthier work-life – Viva Insights offers employees personal insights and recommendations to prioritise wellbeing and boost productivity. Managers are empowered to foster productivity and wellbeing for teams—large or small, helping them proactively drive a healthy team culture and improve team effectiveness.

See results through data and insights – watch improvements in organisational culture, see manager performance improve, understand time spent in costly, long, and large meetings to change behaviours, see happy and healthy staff through your employee surveys.

TECHNICAL CONSULTANCY AND SUPPORT

Our Microsoft Viva Insights experts will guide you through the technical requirements to setup Viva Insights within your tenancy, including:

- Viva Insights roles and responsibilities within the M365 Admin Centre
- Installing, setting up and pinning the Teams App for Viva Insights
- Discussion and support on organisation attributes
- Setting up organisational data files for import
- Security assessment

ADOPTION & CHANGE MANAGEMENT PLAN

At Phoenix, our trained Adoption & Change Management Specialists and Microsoft Viva Insights Badged Practitioners and Specialists will be with you and your organisation every step of your Microsoft Viva Insights journey. Starting with

Leadership 'Build the Plan' workshops to develop the implementation and adoption plan and a series of envisioning workshops, to ignite a spark within your teams, showing the art of the possible and tailoring the package around your organisation and the scope of your project.

Build the plan – Leadership Teams

We offer workshops with leadership teams to:

- Identify key stakeholders (technical, leaders, managers, SMEs, and champions)
- Understand scenarios and use cases
- Map success criteria
- Gather requirements
- Develop an Adoption & Change Management plan, including:
 - Communication strategies
 - Training plans
 - Creating and fostering a network of Viva Insights Digital Champions

At Phoenix, we use a Prosci methodology and follow the ADKAR model. This method is a framework for understanding change at an individual level.

Envisioning Workshops - Introduction to Microsoft Viva

Our Envisioning workshops will kick-start the Microsoft Viva Insights digital journey within your organisation, creating excitement amongst various user-groups, leaders, managers and admins. We'll help you visualise innovative and sustainable solutions for improving employee experience and communications, onboarding, data insights, meeting effectiveness, and employee and manager performance.

Our introductory envisioning workshops will be targeted to the audience:

- Organisational Leaders/Senior Management Teams
- Managers and Directors
- Employees/Champions/Team Trainers

User Workshop/Training

Our hands-on Microsoft Viva Insights Training Workshops will provide your user-groups with the skills and navigation essentials for the aspect of Viva they will be using or managing. This includes workshops for the end-user/individual contributors, as well as workshops for leaders, managers and Viva Insights admins. Following assessment and scoping, a suite of workshops will be recommended that will drive digital skills across your organisation, for both managers and support staff ensuring correct day-to-day use of Viva Insights becomes embedded within your organisation, maximising the return on your investment.

Our User Workshops/Training can include sessions for:

- Leaders
- Managers
- Employees

And covering topics such as:

- Teams Viva Insights App
- Viva Insights Outlook Plug-in
- Daily digest email
- Privacy and trust
- Security and Data Protection
- Data subject requests and GDPR
- Insights for meetings and plans

- Admin training and concepts of Viva Insights roles and organisational data
- Workplace analytics queries and Power BI templates

Practitioner Workshops/Training

Our Practitioner Workshops and Training take your user-groups to the next level of understanding and development of Microsoft Viva Insights. Each Practitioner Workshop is tailored to your different Viva Insights user-groups and can allow for more focussed workshops and mentored configuration.

Infographics and Videos

At Phoenix, we understand everyone learns differently and therefore we can provide materials that use the following learning styles:



Visual
Infographics



Auditory
Video Shorts



Kinesthetic
Interactive workshops

WAYS OF WORKING ASSESSMENT

At Phoenix, we're proud to announce our Ways of Working Assessment Consultancy. In order to improve staff wellbeing and organisation culture, protect your investment in Viva Insights and maximise your return on investment, our data analysts are able to work with you and your leadership team, HR, and IT to deep dive into data insights available from Viva Insights Workplace Analytics, highlighting and exploring opportunities, based on extensive organisational behavioural research, for changing and improving the following within your organisation:

- Meeting culture
- Manager effectiveness
- Wellbeing

The Ways of Working Assessment consultancy is generally a 4-day exercise using queries and templates from Workplace Analytics data to conduct a broad diagnostic assessment of your organisation's collaboration culture and employee experience. It is designed to highlight collaboration patterns for different groups and organisational levels and to identify opportunities for change in more details in the following areas:

COLLABORATION CULTURE

- How is collaboration load impacting after-hours?
- How much time do people spend in different collaboration channels?
- How does the organisation spend its meeting time?
- How much time is going toward long or large meetings?
- Who in the organisation is generating the most workload by organising meetings?
- Can employees reclaim focus time through 'compact' scheduling practices?
- Is multitasking during meetings driven by habit or by necessity?
- Which recurring meetings might present streamlining opportunities?

EMPLOYEE EXPERIENCE

- When does collaboration start impacting after-hours workload?
- Who in the organisation is at highest risk of burnout?
- Is manager double-booking creating potential ripple effects across the company?
- Are employees receiving sufficient 1:1 coaching time?
- Are managers balancing oversight with employee empowerment and autonomy?
- What managerial behaviours predominate across the company and by organisation?
- Are there opportunities to drive greater agility in emailing practices?

SUMMARY

Take the next step in your investment in cloud technology and M365, using data and insights to revolutionise the experience of your Leaders, Users with Microsoft Viva Insights powered by Phoenix.

A tailored plan of

- Implementation and Support
- Adoption and Change Management
- Ways of Working Assessment

Through:

- Training
- Hands-on workshops
- Videos
- Infographics
- Consultation



Let's drive your digital transformation today.

We're ready to take your call to help you plan, build, deploy, protect, optimise and innovate to achieve your business outcomes.